

Strategic Planning Models

Basic Strategic Planning

This model is used in organizations that are small, busy and have not done much strategic planning.

1. Identify your purpose (mission statement).
2. Select the goals your organization must reach if it is to accomplish your mission. Goals should be general and address major issues facing your organization.
3. Identify specific approaches or strategies that must be implemented to reach each goal. Develop objectives that state each step to achieving each goal.
4. Identify specific action plans to implement each strategy. Develop action plans stating how each objective will be met.
5. Monitor and update the plan. Meet regularly to evaluate the plan and make any needed adjustments.

Alignment Model

This model is used to make sure that what the organization does is aligned with its mission statement. It is useful in fine-tuning strategies or exploring why strategies are not working.

1. The planning group outlines the organization's mission, programs, resources and necessary support.
2. Identify what's working well and what needs adjustment.
3. Identify how these adjustments should be made.
4. Include the adjustments as strategies in the strategic plan.

Goal-Based Planning

Many organizations use the basic planning model described above and enhance their plan with this more comprehensive form of planning.

1. External/internal assessment to identify strengths, weaknesses, opportunities, and threats.
2. Strategic analysis to identify and prioritize major issues/goals.
3. Design major strategies (or programs) to address issues/goals.
4. Design/update vision, mission and values.
5. Establish action plans.
6. Record issues, goals strategies/programs, updated mission and vision, and action plans in a strategic plan document.
7. Develop the yearly Operating Plan document.
8. Develop and authorize budget for year one.
9. Conduct the organization's year-one operations.
10. Monitor/review/evaluate/update strategic plan document.

Self-Organizing Planning

This process avoids the notion that strategic planning is linear or mechanical. This process requires continual reference to common values, discussing these values, and shared reflection of the process.

1. Clarify and articulate the organization's cultural values.
2. Articulate the group's vision for the organization.
3. On an ongoing basis, e.g. once every semester, dialogue about what processes are needed to arrive at the vision and what the group is going to do now about those processes.
4. Continually remind yourself and others that this type of planning is never really "over," and that the group needs to learn to conduct its own values clarification, dialogue/reflection, and process updates.
5. Ask the group to reflect on how the organization will portray its strategic plans to stakeholders.